



Somer Community Housing Trust Short Notice Inspection Improvement Plan

June 2010



Contents

| | |
|---|----------|
| Section 1: Executive Summary | 2 |
| 1.0 Introduction | 2 |
| 2.0 Trust's approach to improvements | 2 |
| 3.0 How residents have been involved..... | 2 |
| 4.0 Summary of actions..... | 3 |
| 5.0 Next Steps..... | 4 |
| Section 2: Improvement Plan | 5 |
| 1. Access & Customer Care | 5 |
| 2. Diversity | 13 |
| 3. Value for Money | 20 |
| 4. Gas Servicing..... | 29 |
| 5. Key & Glossary | 33 |
| Section 3: Appendices (available from website at www.somerhousinggroup.co.uk) | |
| A. Somer Times newsletter to residents | |
| B. Viewpoint feedback report | |
| C. Gas safety focus group outcomes 13 May 2010 | |
| D. Feedback report from Somer Residents Committee workshop 18 May 2010 | |
| E. Brief for governance review (confidential) | |
| F. Options Appraisal Report (confidential) | |

Section 1: Executive Summary

1.0 Introduction

- 1.1 Audit Commission inspectors visited during March 2010 to undertake a short notice inspection of the Trust's gas servicing and re-letting of empty homes as well as the cross-cutting themes of access and customer care, diversity and value for money. In response to their findings and recommendations, the Trust has worked with residents to develop an improvement plan to address the weaknesses identified and improve service delivery for our residents. This document sets out the Trust's response to the recommendations, explains how residents have been involved in the development of the plan and how they will continue to be involved in the ongoing monitoring scrutiny of the Trust in relation to delivery of the improvements identified.

2.0 Trust's approach to improvements

- 2.1 In order to ensure a robust approach to developing a SMART improvement plan, the Trust established a staff project team with identified leads for each of the recommendations, plus communications, IT, finance and service improvement representatives from Somer Housing Group Ltd. to support the process. In addition, a Project Board was established to monitor progress and to provide assurances to the Trust Board. This is made up of 4 Trustees, including two tenant Trustees, an independent and a local authority representative. An independent 'critical friend' has also been commissioned by way of a tender process and Ellis Blackmore from Housing Quality Network began providing advice and support to the project team at the beginning of May 2010.
- 2.2 The recommendations from the inspection and the associated improvement plan will be used to improve services provided by other Group subsidiaries through shared learning and increased focus on group-wide cross cutting themes of diversity, access and value for money. A project team made up from officers across the Group is focusing on our response to the TSA standards and development of local offers and there are links from the SNI improvement plan into this work.

3.0 How residents have been involved

- 3.1 Residents have been involved in a variety of ways following the inspection. A communications and consultation plan was developed early on by the project team, using our existing consultation arrangements as well as other methods, to ensure we maximised the opportunities for communicating to and involving residents in the short timescales.
- 3.2 To begin with, we presented a report to Somer Residents Committee explaining the findings and the approach to our response. A special newsletter was sent to all Trust residents with Somer Times at the beginning of May, to tell residents about the inspection and ask for feedback (see Appendix A). We then ran two focus groups for residents; one on re-letting empty homes and the other on gas safety, to get specific feedback on residents' views of the services we provide and to find out what's important to them. As well as asking specific questions about the services, we also sought feedback around the cross-cutting themes. The focus groups weren't well attended (5 residents in total), so to supplement them, we sent a survey out to 143 residents registered with Viewpoint and to 50 residents who had recently experienced the moving in process. We received 72 responses with some really useful detailed feedback that we've used to inform the improvement plans in a number of areas. Finally, we ran a special workshop attended by 21 members from Somer Residents Committee and Area Panels, who considered feedback on the recommendations and discussed the plan and priorities (see Appendices B-D). The summer issue of Somer Times will be used to show residents how their feedback has influenced the plans and this and future issues will also include progress reports on implementation of the plan and performance in improving outcomes for tenants.
- 3.3 All in all 103 residents have been involved in one form or another in the development of the plan, but involvement doesn't stop with the creation of the improvement plan. The Trust will continue to involve residents in monitoring the implementation of the plan. As we develop our resident scrutiny arrangements in accordance with the new TSA standards we anticipate this being the forum for ongoing scrutiny of the Trust's service delivery performance and the SNI improvement plan. In addition, improvements in services from the short notice inspection will be used to involve residents in the development of local offers for gas safety and lettings under the new TSA standards.

4.0 Summary of actions

4.1 Section 2 contains our improvement plans with specific actions relating to each recommendation provided by the Audit Commission. The format for the plan is as follows:

- Four tables in total, one for each recommendation on access and customer care; diversity; value for money and gas servicing;
- Each table divided into sections for each recommendation;
- Each action has an individual reference number and where relevant cross reference to other actions has been highlighted;
- Each action contains information about lead officer, evidence required to demonstrate outcome and progress achieved to the point of finalising the plan plus any other relevant comments.

4.2 The key achievements to date, which will result in measurable service improvements for residents, are:

Access and Customer care

- Service standards developed with residents approved by Board in May and published agencies in the form of our 'local offer' (to residents in Summer issue of Somer Times)
- Monitoring framework in place to monitor performance against the standards
- Telephone monitoring being undertaken
- Complaints review on target to be completed in June. Consultants appointed following tender
- STATUS survey fieldwork complete
- Easy to read re-let standard agreed with residents
- Appointments out of hours routinely made

Equality and diversity

- Workshop held at Board member conference
- User friendly version of the Equality and Diversity strategy drafted and circulated for comment
- E&D information on the website up to date and responsibility for keeping it updated given to Service Improvement Manager
- Tenant Profiling contractor appointed following tender process
- Equality Impact Assessment undertaken on gas servicing
- Satisfaction monitoring methodology agreed and in place for gas safety and lettings and voids which takes account of the 7 equality strands

Value for money

- Benchmarking workshop held at Board member conference
- Report to Board on Housemark Benchmark results in June
- Joined Housemark gas benchmarking service with a focus on quality
- Registered with Pennington's gas benchmarking service with a focus on cost
- Asset Management Strategy approved by Board in May
- New performance framework in place
- End-of-tenancy incentive scheme in place
- Re-let performance has improved to average 24 days by end May after an increase to an average of 70 days due to letting 6 hard-to-let long term voids during April. A record of 94 properties were let during May 2010
- Clean and clear incentive policy and procedure in place
- Open multiple viewings of properties routinely used as well as open days at sheltered schemes
- Increased marketing, dedicated officer and email address established for sheltered housing
- Marketing properties internally as well as via CBL
- Sheltered Housing Officers letting sheltered homes
- Managing major repairs in voids policy in draft
- New allocations policy approved by Board in May

Gas safety Servicing

- Servicing brought forward 4 weeks
- Appointments out of hours and Saturday morning routinely made
- Staff consultation starts this month on revised terms and conditions
- New policy and procedure in place
- External quality audit programme has been revised and increased and 10% checks completed and action taken on results where required
- Training schedule in place for internal quality audit checks
- New resident information in place

4.3 Somer Community Housing Trust, as a member of Somer Housing Group, is committed to continuous improvement in service delivery for residents. There are a number of Group-wide activities that are due to take place or have commenced to support the improvements, including the following:

- A full governance review is in the process of being commissioned (brief attached at Appendix E). Led by the Group Chief Executive, this work will meet the recommendations of the TSA and is due to commence by July 2010. We anticipate completion within 6 months. The outcome of this review will be to ensure that sound governance and an effective focus on service delivery are embedded in any future arrangements;
- A review of the Group's performance management framework is underway and due to report to the Boards in July 2010. This review is in part driven by the requirements of the new TSA standards but has also taken on board the feedback from inspection. The outcome of this project will be to ensure that accessible, relevant and timely performance information is reported to residents and Boards, to aid scrutiny and decision making across the whole Group;
- Actions contained within the individual improvement plans will, once complete, provide the basis for robust business planning for 2011/12 in accordance with the TSA standards; particularly with relation to value for money with the implementation of the VFM strategy coupled with specific and detailed work understanding service delivery costs in relation to quality. This will enable a fuller engagement with residents on service delivery choices for our local offer at a Group and subsidiary level;
- 'Upgrade / replacement of Somer Housing management and financial management systems' project commenced in November 2009 and consists of 2 phases; phase 1 options appraisal examined 6 options in respect of the housing management system and 4 options relating to financial management system. The outcome from this phase is an options appraisal report that sets out recommendations in respect of the replacement of the housing management system and financial management system. The report was approved by the project board and the Group Executive team in May 2010 (report attached at Appendix F). Phase 2 follows, which is the implementation of recommendations set out in the Phase 1 report. Projected completion of phase 2 is October 2011.

5.0 Next Steps

5.1 The Trust will continue to deliver the actions set out in the improvement plans to ensure positive outcomes for residents. Progress will continue to be monitored by the Project Board on a monthly basis, with updates provided to residents, the Trust Board and Tenant Service Authority. We have developed an evidence file to demonstrate our achievements as set out in 4.2 above. We will continue to add to the file, which will be made available to the Project Board and also to the TSA as part of their progress monitoring of the plan.

5.2 Residents will continue to be involved, embracing the new regulatory approach of co-regulation and tenant scrutiny of performance within the new TSA standards. Consideration has been given throughout the improvement plans to how actions will support achievement of the required standards and the development of local offers for residents, expected to be in place by April 2011. It is expected that the improvement plans will evolve and develop into the action plan to meet the TSA standards.

5.3 The Trust is confident that the approach to development of the improvement plan has been robust and thorough and addresses the recommendations as provided by the Audit Commission. A wide number of residents have been given the opportunity to become involved in the development of the plans and we are satisfied that the final plans adequately reflect the feedback received. Actions contained within the plans are either complete or underway and we have confidence that they will be completed within the timescales set down by the Audit Commission and will provide positive outcomes for residents in terms of improved service delivery, improved access to services and improved information in relation to the services inspected and in accordance with the TSA standards. The Project Board provided assurances to this effect to the Trust Board at its meeting on 15 June 2010 and the improvement plan was approved by the Board.

Section 2: Improvement Plan

1. Access & Customer Care

| ACCESS & CUSTOMER CARE | | | | | | | |
|---|--|------------------------|----------------------|-----------|---|--|---|
| Recommendation R1 | | | | | | | |
| Improve outcomes for tenants in the services inspected by: <ul style="list-style-type: none"> - completing the development of comprehensive measurable services standards with residents for the services inspected, and monitor and publicise performance against the standards Outcomes to be achieved: <ul style="list-style-type: none"> - tenants will be clearer on what they can expect from the service and when they are not receiving the level promised; - up to date and clear customer information in electronic formats; - better access to the gas repairs and servicing team by telephone; - better evidence that complaints from tenants are being handled effectively; and - improved service delivery. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to demonstrate outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 1.1 | Gain Board approval to Service Standards developed with residents | DCS(H&S) | N/A | May 2010 | Improved tenant feedback on performance against the service offers through customer surveys, mystery shopping, and performance against measures which will demonstrate our delivery against the offers. Increased levels of satisfaction with services as a result of implementing lessons learned from the feedback. | 100% First monitoring reports will commence June 2010 | Links to TSA standard 1 and Local Offer on Customer Services Board report written and approval sought and agreed on 04/05/10. All standards now complete. Targets and measures agreed. |
| 1.2 | Launch suite of service standards, including gas servicing and lettings to customers and integrate into customer information | DCS (H&S) | Budget (£2000) CM | July 2010 | Increased information to tenants through published leaflet; sent with summer issue of Somer Times; web page; provide information in new tenants pack. Regular reminders to tenants of service standards information provided through Somer Times and Local service Centres as well as other opportunities e.g. rent statements. Increased feedback from tenants on service performance and quality. | 70% | Refer to 1.1 above. Agreed Communications requirements before tenant launch in summer issue of Somer Times. |

ACCESS & CUSTOMER CARE
Recommendation R1

Improve outcomes for tenants in the services inspected by:

- completing the development of comprehensive measurable services standards with residents for the services inspected, and monitor and publicise performance against the standards

Outcomes to be achieved:

- tenants will be clearer on what they can expect from the service and when they are not receiving the level promised;
- up to date and clear customer information in electronic formats;
- better access to the gas repairs and servicing team by telephone;
- better evidence that complaints from tenants are being handled effectively; and
- improved service delivery.

| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to demonstrate outcome achieved | Progress made (% completion reported quarterly) | Comments |
|-----|--|------------------------|--------------------|--|---|---|---|
| | | | | | Feedback from STATUS survey 2013 | | |
| 1.3 | Establish monitoring system against the service standards | DCS (H&S) | SIM | June 2010 | Monitoring system in place and being used. Regular reports to residents via Area panels and SRC Annual report to Board and tenants starting in October 2011 | 75% | Monitoring framework is in place, training for staff and residents on monitoring and scrutinising performance to be arranged for June 2010. Telephone monitoring to be rolled out to managers desktops with training by end of May – achieved. |
| 1.4 | Train staff in service standards and monitoring system | DCS (H&S) | HR | June 2010 | Attendance List Training evaluation report Meeting staff targets and regular appraisal of improvement | 50% | See 1.3 above Service offer workshops for managers arranged for June - first workshop took place 4/6/10, second workshop 16/6/10 |
| 1.5 | Monitor service achieved against the service standards and actions required to improve performance | DCS (H&S) | CIM CM SIM | Quarterly 2010/11 and ongoing (1 st report to Board September 2010) | Monitoring reports to Board and Somer Residents Committee each quarter to include outputs, recommended actions to improve and reports on actions taken; Increased scrutiny and challenge of Trust's performance by residents Up-to-date performance information on website and newsletter Service improvement through response to areas of service weakness where the required standard is not being achieved leading to increased levels of customer satisfaction. Improved satisfaction with access to lettings | 50% | Links to TSA standards and Somer local offers. Standards launched in July to tenants. Will start to collate telephone monitoring from April, so can send full Q.2 performance to Board and SRC in September. |

| ACCESS & CUSTOMER CARE Recommendation R1 | | | | | | | |
|--|--|------------------------|--------------------|----------|--|---|--|
| Improve outcomes for tenants in the services inspected by: - completing the development of comprehensive measurable services standards with residents for the services inspected, and monitor and publicise performance against the standards Outcomes to be achieved: - tenants will be clearer on what they can expect from the service and when they are not receiving the level promised; - up to date and clear customer information in electronic formats; - better access to the gas repairs and servicing team by telephone; - better evidence that complaints from tenants are being handled effectively; and - improved service delivery. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to demonstrate outcome achieved | Progress made (% completion reported quarterly) | Comments |
| | | | | | and gas servicing through flexible appointments Annual report to Board and tenants starting by October 2011 | | |
| 1.6 | Test resident views on new service standards | DCS (H&S) | CIM | May 2010 | Service standards reflect customer priorities. Annual report to tenants | 100% | Standards were created in partnership with Resident Working Group. Standards were sent to Viewpoint for comment and feedback in March 2010 and response was very positive. Standards endorsed by SRC in April. Revised re-let standard endorsed by SRC focus group on 18/5/10. |

| ACCESS & CUSTOMER CARE Recommendation: R1 | | | | | | | |
|---|--|------------------------|--|-----------|--|---|---|
| Improve outcomes for tenants in the services inspected by: - ensuring that the website is routinely updated with information that is relevant to tenants Outcomes to be achieved: - tenants will be clearer on what they can expect from the service and when they are not receiving the level promised; - up to date and clear customer information in electronic formats; - better access to the gas repairs and servicing team by telephone; - better evidence that complaints from tenants are being handled effectively; and - improved service delivery. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 1.7 | Put in place a system for keeping the website up to date with correct links to pages and other sites | ADTS | Named people with given responsibility for web pages CM | June 2010 | Residents can access up to date information about the Trust and its performance. Tenant scrutiny and challenge opportunities is enhanced. | 100% | Links to TSA standard 1 List of responsible officers for website updating completed with timetables of completion. |

ACCESS & CUSTOMER CARE**Recommendation: R1**

Improve outcomes for tenants in the services inspected by:

- ensuring that the website is routinely updated with information that is relevant to tenants

Outcomes to be achieved:

- tenants will be clearer on what they can expect from the service and when they are not receiving the level promised;
- up to date and clear customer information in electronic formats;
- better access to the gas repairs and servicing team by telephone;
- better evidence that complaints from tenants are being handled effectively; and
- improved service delivery.

| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
|-----|---|------------------------|---|-------------|---|---|--|
| | | | | | | | Responsible officers will be measured for their performance on updating web pages as part of their monthly performance reports. |
| 1.8 | Carry out an Equality Impact Assessment on the Website | CM | SIM Residents' Communications Group (to be established) BME Focus Group | July 2010 | Report to Service Delivery sub-group with action plan to feed into website improvements | 0% | Links to 2.19-2.10 |
| 1.9 | With residents, check that the website delivers information that customers want and put in place an online survey to check satisfaction and gain feedback | CM | SIM Residents' Communications Group (to be established) BME Focus Group Customer profiling data | August 2010 | Customer satisfaction with website access and ease of use | 0% | Links to TSA standard 1 Customer focus groups being arranged to discuss findings of AC on 2 inspected service areas, which will ask for customer requirements of website. |

ACCESS & CUSTOMER CARE**Recommendation: R1**

Improve outcomes for tenants in the services inspected by:

- improving the monitoring of telephone answering, and the performance of telephone answering for gas repairs and servicing

Outcomes to be achieved:

- tenants will be clearer on what they can expect from the service and when they are not receiving the level promised;
- up to date and clear customer information in electronic formats;
- better access to the gas repairs and servicing team by telephone;
- better evidence that complaints from tenants are being handled effectively; and
- improved service delivery.

| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
|------|---|------------------------|---|--------------|---|---|---|
| 1.10 | All telephone calls are monitored and the information is used to drive improvements | CSM P&AM | Access to ARC incl licenses Training CSA Network Engineer(JN) | July 2010 | Customer satisfaction with service received via telephone is increased. | 75% | Links to TSA standard 1 and local service standards, see 1.3, 1.5 above |
| 1.11 | Monitor and report on abandoned calls as part of performance monitoring information | DCS (H&S) DCS (P) | CIO | July 2010 | Level of abandoned calls reduced Customer satisfaction with service received via telephone is increased. | 75% | Links to TSA standard 1 and local service standards, see 1.3, 1.5 and 1.10 above |
| 1.12 | Systems thinking intervention in lettings to identify further services demand from customers for service delivered via telephone and re-design service to meet demand | P&AM | LSM LC LSO VTL | October 2010 | Increased customer satisfaction with Lettings service Level of abandoned calls reduced. Customers get the information they want easily and first time Increased value for money of the letting service | 0% | Intervention planned for October. |
| 1.13 | Introduce satisfaction monitoring for telephone service including mystery shopping, and satisfaction surveys | DCS(H&S) | SCM CIM SIM CM Budget £5k | July 2010 | Increased customer satisfaction with telephone service Areas of weakness and need for improvement identified. | 40% | Links to TSA standard 1 and local service standards, see 1.3, 1.5 and 1.10 above. |

| ACCESS & CUSTOMER CARE | | | | | | | |
|---|--|-------------------------------|---|--|---|--|---|
| Recommendation: R1 | | | | | | | |
| Improve outcomes for tenants in the services inspected by: <ul style="list-style-type: none"> - improving the overall management and performance of complaints handling and monitoring Outcomes to be achieved: <ul style="list-style-type: none"> - tenants will be clearer on what they can expect from the service and when they are not receiving the level promised; - up to date and clear customer information in electronic formats; - better access to the gas repairs and servicing team by telephone; - better evidence that complaints from tenants are being handled effectively; and - improved service delivery. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 1.14 | Complete the review of complaints across the Group | SCHT MD | Project Team £20k | July 2010 | Revised policy and procedures in place | 50% | Consultant commissioned to support project. Focus groups held with staff, residents and board members. Review of policy and procedures undertaken. Presentation on findings arranged. |
| 1.15 | Complete an equality impact assessment of complaints as part of the development of a revised policy and procedures | SCHT MD | Project Team | July 2010 | EIA completed and reported to Board with associated actions required Complaints monitored by diversity group and targets met for improving services for diverse range of tenants. | 0% | |
| 1.16 | Develop a new system to effectively administer complaints | SCHT MD | Allowed for within project budget | August 2010 | New system in place | 0% | |
| 1.17 | Develop a web-based form for customers to register complaints | SCHT MD | Allowed for within project budget CM | August 2010 | Website updated Increased ways for customers to complain | 0% | |
| 1.18 | Train staff in how to deal with complaints effectively | SCHT MD | Allowed for within project budget | August 2010 | Increased customer satisfaction with way their complaint is handled. Satisfaction with complaints evaluated and assessed by diversity group and cost (VFM) More complaints resolved at Stage 1. | 10% | 2 x 1 day training with consultant arranged for front line staff 1 x ½ day training with consultant arranged for Board members 1 x 1 day training with consultants arranged for 12 trainers |
| 1.19 | A learning log is created and used to capture the learning from complaints and compliments which is shared across teams and to residents and Board | SCHT MD | Allowed for within project budget | July 2010 – first report on learning to Board September 2010 (first | Learning log established. Team meeting notes demonstrate learning shared Performance report to Board includes complaints related data Data and learning regularly provided to residents (Somerset Times and web updates) | 0% | Links to TSA standard 1. |

ACCESS & CUSTOMER CARE
Recommendation: R1

Improve outcomes for tenants in the services inspected by:
 - improving the overall management and performance of complaints handling and monitoring
 Outcomes to be achieved:
 - tenants will be clearer on what they can expect from the service and when they are not receiving the level promised;
 - up to date and clear customer information in electronic formats;
 - better access to the gas repairs and servicing team by telephone;
 - better evidence that complaints from tenants are being handled effectively; and
 - improved service delivery.

| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
|------|--|------------------------|-----------------------------------|--------------------------------|--|---|--|
| | | | | report on new system to Board) | Service to customers improves as a result of implementing learning Increased customer satisfaction Increased confidence of customers to complain, knowing that they will be listened to and acted upon | | |
| 1.20 | Develop a monitoring system that reports on key measures of complaints, including levels of satisfaction with aspects of the process | SCHT MD | Allowed for within project budget | July 2010 | Monitoring system for gas and lettings services in place Performance report to Board includes complaints related data Data and learning regularly provided to residents (Somer Times and web updates) Methods of capturing satisfaction used and fed back through performance reports | 50% | Monitoring system in place for gas and lettings services |

ACCESS & CUSTOMER CARE**Recommendation: R1**

Improve outcomes for tenants in the services inspected by:

- reviewing the re-let standard with tenants and providing it to all customers that are viewing a property

Outcomes to be achieved:

- tenants will be clearer on what they can expect from the service and when they are not receiving the level promised;
- up to date and clear customer information in electronic formats;
- better access to the gas repairs and servicing team by telephone;
- better evidence that complaints from tenants are being handled effectively; and
- improved service delivery.

| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
|------|--|------------------------|----------------------------|-----------|--|---|--|
| 1.21 | Review re-let standard as part of actions in 1.1 to 1.6 above | DCS(H&S) | ADTS LSM | June 2010 | Reduction in complaints Reduction in follow up repairs requested after letting Increased levels of satisfaction | 100% | New service standard set as part of the customer service standards suite with link to TSA Standards and local offers. New re-let standard published, endorsed by SRC on 18/5/10 at SNI focus group. Standard reflects SRC feedback. Given to all new tenants as part of letting pack. |
| 1.22 | Review the questions in the Customer satisfaction Questionnaire for Voids and Lettings to reflect the new service standards and ask whether the Trust has delivered: - the Lettings Standard - opportunity for a viewing - communication - VFM Follow up telephone survey to ascertain whether issues have been addressed where customers considered the property/service as a 'poor' | LSM | LSOs VTLs LSA CIO | June 2010 | Survey reviewed Satisfaction improvement targets met. Voids are regularly inspected and evaluated by tenant inspectors. Level of satisfaction reported to Board, tenant scrutiny panel and reported regularly in Somer Times, and annual tenants report | 100% | Complete |

2. Diversity

| DIVERSITY | | | | | | | |
|--|--|------------------------|----------------------------------|-----------|---|---|---|
| Recommendation: R2 | | | | | | | |
| Strengthen the approach to equality and diversity in the services inspected by: | | | | | | | |
| - strengthening the corporate commitment and profile to improve the Trust's approach to equalities and diversity | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - services that reflect the needs of customers and are accessible to all tenants; and | | | | | | | |
| - services which do not inadvertently discriminate and which can demonstrate they are equitable. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 2.1 | Deliver Equality and Diversity Training on all equality strands including challenging disrespectful behaviour, for staff, board and residents | GDCS | HR Training budget | July 2010 | Trainees feedback information Customer satisfaction with moving in process and with gas safety servicing provides evidence of equal services across equality strands | 50% | Training dates established with ACTIVATE for July |
| 2.2 | Review all media informing tenants of lettings and gas safety services and make available on website, tapes, CDs, Braille and send to wide range of agencies | DCS (H&S) DCS (P) | CM Communication Budget | June 2010 | Information available in a variety of media List of agencies sent to and kept up dated Review by Viewpoint and resident working parties | 50% | Response to residents comments on the action plan Website has BrowseAloud and translation facilities. Information about how to find a home and moving from a current trust home has been updated on the website. New "home sweet home" lettings standard developed with residents and implemented. Customer services standards include a "moving in" and a "moving out" commitment. The customer satisfaction survey for new residents has been redesigned and includes equalities data. |
| 2.3 | Arrange a workshop on diversity issues for the Board members conference | GCE | Board members training budget | June 2010 | Board member feedback from event | 75% | Equality South West commissioned to facilitate workshop. Complete. Awaiting feedback report. |
| 2.4 | Publish a user-friendly summary of the Equality and Diversity strategy and the activities we are undertaking which positively impact on E&D | SCHT MD | CM £5,000 | July 2010 | Published document | 50% | First draft of document circulated for comments |
| 2.5 | Ensure that the E&D information on the website is up to date | SIM | Staff time CM | May 2010 | Webpage up to date | 100% | Complete |

| DIVERSITY | | | | | | | |
|--|---|-------------------------------|--|---------------|---|--|-----------------|
| Recommendation: R2 | | | | | | | |
| Strengthen the approach to equality and diversity in the services inspected by: | | | | | | | |
| - strengthening the corporate commitment and profile to improve the Trust's approach to equalities and diversity | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - services that reflect the needs of customers and are accessible to all tenants; and | | | | | | | |
| - services which do not inadvertently discriminate and which can demonstrate they are equitable. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 2.6 | Review existing Disability Equality Scheme and Gender equality Scheme and develop a Single Equality Scheme for Somer covering all protected characteristics identified by the Equality Act 2010 | SIM | Service delivery and employment sub-groups; CIT for resident and community involvement CM | August 2010 | Single Equality Scheme published and user-friendly summary available on website | 0% | |

| DIVERSITY | | | | | | | |
|---|--|-------------------------------|---|---------------|---|--|--|
| Recommendation: R2 | | | | | | | |
| Strengthen the approach to equality and diversity in the services inspected by: | | | | | | | |
| <ul style="list-style-type: none"> - developing a comprehensive understanding of the tenant profile - using the profiling information obtained to ensure that services are accessible, appropriate and meeting need | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| <ul style="list-style-type: none"> - services that reflect the needs of customers and are accessible to all tenants; and - services which do not inadvertently discriminate and which can demonstrate they are equitable. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 2.7 | Complete Tenant profiling project | DCS (H&S) | Project Group SIM NSO CSM ICTM CM £50k | August 2010 | Increased percentage of profile information available Report to Board on tenant profile and service implications Improved levels of customer satisfaction due to staff being able to tailor services to meet individual needs | 20% | Links to TSA standards Questions designed and agreed Tenders received, evaluated and a Consultant has been appointed (C&R). Set up meeting with the consultants held. Agreed scope of the work and time table for completion. |
| 2.8 | Review equality impact assessments of voids and lettings and gas servicing with profile information when available | SCHT MD | SIM LSM LC LSO VTL BME Focus Group SHOP | August 2010 | Data used and actions agreed in relation to the services as a result Improved levels of customer satisfaction | 0% | Links to 2.7, 2.16 and service standards at 1.1-1.6 |

| DIVERSITY | | | | | | | |
|---|--|-------------------------------|---------------------------|---------------|--|--|---|
| Recommendation: R2 | | | | | | | |
| Strengthen the approach to equality and diversity in the services inspected by: | | | | | | | |
| - monitoring and reporting against the six diversity strands and address the findings, including tenant satisfaction monitoring | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - services that reflect the needs of customers and are accessible to all tenants; and | | | | | | | |
| - services which do not inadvertently discriminate and which can demonstrate they are equitable. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 2.9 | Set equality objectives for Lettings and Void Management and Gas Safety Services and develop a methodology for monitoring satisfaction across lettings and gas safety services | DCS(H&S) / DCS (P) | None | May 2010 | Measures set against objectives Satisfaction monitoring process documented and used Documented satisfaction / dissatisfaction analysis Documented evidence of action taken in response to dissatisfaction Feedback obtained from residents in relation to action taken | 100% | Satisfaction methodology agreed and performance being monitored. To be reviewed following completion of Tenant Profiling project to ensure data collection is efficient taking account of new profiling information. Gas safety target is 100%, so equalities measured through customer satisfaction Customer Satisfaction survey for lettings has been redesigned and includes equalities information. |
| 2.10 | Monitoring information reported quarterly to Board and Somer Residents Committee, including learning, action taken and feedback on action taken | SCHT MD | None | July 2010 | Monitoring reports in place and being used routinely to assess performance | 50% | Links to TSA standard 1 Performance monitoring framework in place and includes equality and diversity measures |

| DIVERSITY | | | | | | | |
|--|---|-------------------------------|---------------------------|---------------|--|--|---|
| Recommendation: R2 | | | | | | | |
| Strengthen the approach to equality and diversity in the services inspected by: | | | | | | | |
| - setting targets against key service areas and board and staff membership to reflect the tenant profile | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - services that reflect the needs of customers and are accessible to all tenants; and | | | | | | | |
| - services which do not inadvertently discriminate and which can demonstrate they are equitable. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 2.11 | Review targets for board members and staff against the tenant profile and revise targets to reflect the profile | H of G GDCS | None | August 2010 | Board report on targets Quarterly monitoring against targets on letting profile and satisfaction by diversity strands | 15% | Board member recruitment underway Targets for staff reviewed by GDCS |
| 2.12 | Employment group to make recommendations on how to increase diversity of gas team and repairs team | GDCS | None | August 2010 | Report to Board to approve recommendations in July Implementation monitoring document | 0% | |
| 2.13 | Employment group to make recommendations on increasing diversity of staff across all services | GDCS | None | August 2010 | Report to Board to approve recommendations in July Implementation monitoring document | 0% | |

| DIVERSITY | | | | | | | |
|---|---|-------------------------------|--|---------------|--|--|--|
| Recommendation: R2 | | | | | | | |
| Strengthen the approach to equality and diversity in the services inspected by: | | | | | | | |
| - putting in place a timetabled programme of robust Equality Impact Assessments (EIAs) and acting on their findings | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - services that reflect the needs of customers and are accessible to all tenants; and | | | | | | | |
| - services which do not inadvertently discriminate and which can demonstrate they are equitable. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 2.14 | Undertake EIAs in the areas inspected and report on the findings and actions taken to Board | SCHT MD | SIM P&AM CPM Service delivery sub-group BME Focus group SHOP SRC | August 2010 | Equality Impact Assessments completed and outcomes reported to the Board and the residents group | 80% | EIA undertaken on Gas Service and reported to Board EIA undertaken for the Older Persons Service EIA being developed for Housing Services EIA undertaken for Domestic Abuse EIA undertaken for Hate Crime EIA undertaken for the Allocations Policy |
| 2.15 | Develop 3-year programme of EIAs based on policy review and service improvement programme | SCHT MD | SIM P&AM | June 2010 | Programme in place and underway | 50% | Two Equality Impact Assessments workshop have been held with a further workshop planned in August. These workshops have covered the services provided by the Housing and Support Directorate. Programme for Housing and Support agreed. |

| DIVERSITY | | | | | | | |
|--|---|-------------------------------|---------------------------|---------------|---|--|--|
| Recommendation: R2 | | | | | | | |
| Strengthen the approach to equality and diversity in the services inspected by: | | | | | | | |
| - improving the approach taken to domestic violence and harassment by: providing clearer service information and standards; monitoring service delivery; and reporting against outcome focused targets | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - services that reflect the needs of customers and are accessible to all tenants; and | | | | | | | |
| - services which do not inadvertently discriminate and which can demonstrate they are equitable. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 2.16 | Publicise the services available for people who experience hate crime, harassment and domestic violence | ASBM | Communication Budget | July 2010 | Published service standards. Positive feedback from Viewpoint and BME Focus Group. Survey of people using the service demonstrates that they were able to access what they required | 90% | Links to 1.1-1.4 service standards Website and Leaflet information re-drafted and uploaded onto website. Leaflets to print 1 July. |
| 2.17 | Monitor performance against the service standards and actions required to improve performance | ASBM | None | July 2010 | Monitoring reports include outturn and satisfaction performance Annual report to tenants | 50% | Links to 1.5 Reviewed current performance and outcomes monitoring against our service standards, CLG Tools & Powers Toolkit for Landlords, KLOE and RSLs with positive inspections outcomes. New database, to record case management and monitoring information being built by ICT to be completed by June 2010. Testing to be carried out and then new data base & new monitoring implemented. Systems thinking intervention scoped and will commence in July. |

3. Value for Money

| VALUE FOR MONEY | | | | | | | |
|--|---|------------------------|---------------------------------------|-----------|--|---|---|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: | | | | | | | |
| - improving the corporate commitment and profile to deliver services that are value for money | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - a better understanding of how service costs compare to other organisations providing similar services; | | | | | | | |
| - homes that are let quickly to those in housing need; and | | | | | | | |
| - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 3.1 | Deliver initial actions of the approved VFM strategy | GFD SIM | | July 2010 | <p>VFM strategy (developed with resident involvement) published and launched to staff and residents</p> <p>Staff in services inspected attended VFM workshop</p> <p>Board quarterly performance packs reflect value for money approach</p> <p>Reports to Board show increased focus on VFM and how the VFM Strategic objectives are being met.</p> <p>Board minutes reflect increased consideration of VFM.</p> <p>VFM register fully in place, focussing on good examples of VFM. Actions taken and feedback through to staff.</p> <p>Mechanism in place where staff are able to feedback to the Group Director of Finance on examples of poor VFM.</p> | 75% | <p>Workshops planned and published in Somersault April 2010. 1st workshops carried out 17/05/10. Plan to complete for all staff within the Group by December 2010.</p> <p>VFM register in place</p> <p>GFD to attend SRC Scrutiny Workshop 29 June 2010</p> <p>Board quarterly performance packs designed to reflect VFM</p> <p>Launch to residents in summer Somertimes</p> |
| 3.2 | Present the findings of the 2008/09 Housemark benchmark exercise to Directors, Trust Operational Managers and the Trust Board. Housemark report made | GFD | Housemark Benchmarking Manager. CM | June 2010 | <p>Group Executive Minute and profile and importance raised of benchmarking.</p> <p>Board minute, and discussion that demonstrates that the Board is fully aware of how costs and services compare and prioritises for improving VFM in weaker areas.</p> | 100% | Complete |

| VALUE FOR MONEY | | | | | | | |
|--|--|------------------------|--------------------|-------------|---|---|---|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: - improving the corporate commitment and profile to deliver services that are value for money Outcomes to be achieved: - a better understanding of how service costs compare to other organisations providing similar services; - homes that are let quickly to those in housing need; and - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| | available to all staff on the staff intranet. | | | | | | |
| 3.3 | Housemark leading workshop at annual Board conference. | GCE | GFD CM | June 10 | Board members have good understanding of their role in assessing VFM | 100% | Complete. |
| 3.4 | Use STATUS survey and Better Places survey results to inform VFM priorities for residents | SCHT MD | Resident Input | July 2010 | VFM Action plan drawn up with residents that sets challenging targets for improvements in VFM satisfaction for all services. | 60% | Field work complete. Draft report anticipated early July. |
| 3.5 | Introduce a VFM Review procedure to enable greater clarification as to why a service area or cost area should be subject to a VFM review. | GFD | | July 2010 | VFM Review procedure in place that sets out a broad framework for selecting service areas or types of costs that should be reviewed because they are not offering good VFM Framework agreed with Directors. Service Improvement Methodology updated as a result. | 0% | |
| 3.6 | Introduce resident involvement in the scrutiny of budget setting, management accounts monitoring & VFM targets. | SCHT MD | GFD | Sept 2010 | Somer Residents Committee reviews quarterly management accounts and feedback to Board. SRC/Tenant Scrutiny Panel receive quarterly performance information. | 0% | |
| 3.7 | Develop a VFM summary, in response to resident feedback, for inclusion as part of the management accounts that improves the visibility of the costs of services and overheads and is in line with the reporting of | GFD | H of MA | August 2010 | VFM Summary developed as part of the management accounts with positive feedback from decision makers and residents. | 50% | |

| VALUE FOR MONEY | | | | | | | |
|--|--|-------------------------------|---------------------------|---------------|---|--|---|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: | | | | | | | |
| - improving the corporate commitment and profile to deliver services that are value for money | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - a better understanding of how service costs compare to other organisations providing similar services; | | | | | | | |
| - homes that are let quickly to those in housing need; and | | | | | | | |
| - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| | costs in the VFM Strategy. Publish in Somer Times and used by SRC. | | | | | | |
| 3.8 | Improve the presentation of the 2009/10 financial information to be resident friendly in the annual performance reports to stakeholders. | GFD | H of MA CIM CM | Sept 2010 | Positive feedback from residents that financial information is easier to understand and that residents have a better understanding of costs and VFM targets for each service/ local offer and how the money is spent. | 10% | Links to TSA standard 5 |
| 3.9 | Gain Board approval for the new Asset Management Strategy . | AD (AM) | | May 2010 | Board minutes reflect approval gained. | 100% | Complete |
| 3.10 | Deliver key actions within the strategy relating to options appraisals of high cost / low performance properties | AD (AM) | Finance | End Sept 2010 | Options appraisals programme and process developed and completed and actions required taken to Board for approval | 25% | Board approval project management resources |

| VALUE FOR MONEY | | | | | | | |
|---|--|-------------------------------|-----------------------------------|----------------|--|--|---|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: - routinely benchmarking service costs with high performers, and addressing findings Outcomes to be achieved: - a better understanding of how service costs compare to other organisations providing similar services; - homes that are let quickly to those in housing need; and - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 3.11 | Join Housemark gas benchmarking (quality) service and input data | SIM GSM | | July 2010 | Benchmarking reports being used to set challenging targets for improvement Benchmarking data included in quarterly improvement packs Actions reflect learning from benchmarking data | 50% | Now joined. |
| 3.12 | Carry out benchmarking exercise on gas and voids with Penningtons (gas) Housemark-voids) Explore application of Housemark data for gas cost data | DCS(P)/ GSM /LSM | AA (MA) H of MA MIO | September 2010 | Benchmarking complete. Benchmarking data included in quarterly improvement packs Action Plan developed based on findings adopted by Board and progress against timescale | 20% | Joined Penningtons benchmarking club (gas). Analysis of benchmarking data to be carried out for 09/10 results. Submission of data for 10/11 benchmarking June 2010 Detailed analysis of void benchmarking data to be carried out using Housemark information |

| VALUE FOR MONEY | | | | | | | |
|---|--|------------------------|--|-----------|--|---|---|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: <ul style="list-style-type: none"> - improving empty property re-let performance Outcomes to be achieved: <ul style="list-style-type: none"> - a better understanding of how service costs compare to other organisations providing similar services; - homes that are let quickly to those in housing need; and - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 3.13 | Develop a suite of performance measures with clear targets and benchmark data to monitor the voids and lettings process and associated costs | ADTS | LSM LSOs LSC OPHSM H of MA | July 2010 | Weekly performance pack used by the Lettings Services Manager to monitor performance and inform appropriate action Areas for service improvement are identified through benchmarking, resulting in improved service to tenants and higher levels of tenant satisfaction. Higher levels of satisfaction. Measures against outcomes reported to SRC/Tenant Scrutiny Panel | 75% | Q4 performance report to Board provided breakdown on vacant homes and re-let times by GN and sheltered Action linked to 3.13 Weekly performance measures for voids is up and running. We have a clear understanding of number of voids, available and unavailable. Voids process has been re-written and performance against these processes is starting to be monitored. Performance framework developed New voids and lettings procedure PECT SLA in place to assist with the management of utilities whilst properties are empty. Monitor will show savings/outcomes as a result of the new arrangements for utilities. |
| 3.14 | Develop and implement specific targets for completion of major works repairs | ADAM / LSM | DCS(P) ADTS LSOs | July 2010 | More properties are available for letting. Void loss is reduced. | 75% | See 3.13 above |
| 3.15 | Publicise and launch the end of tenancy incentive scheme (Clean and Clear Bonus Scheme) | LSM | CM | June 2010 | Reduced Void Costs with additional income being used to increase the lettings standard leading to higher rates of take up and greater satisfaction with new home. Reduced re-let times | 100% | Scheme developed. Publicity material produced. Launched May 2010. Staff briefed. Articles in Somer Times and Somersault. Posters and leaflets produced and promoted at the LSCs and to residents when ending their tenancy. First tenant received incentive payment |
| 3.16 | Revise allocations criteria to increase choice and applicant 'pool' | DCS(H&S) | | May 2010 | Board minute from 04/05/10 meeting reflects approval to new policy Tenants and partners consulted and informed of changes | 100% | Board approved revised policy on 4 May 2010. Largest CBL partner met and consulted on changes and agreed changes. New criteria is already being used when letting properties. |

| VALUE FOR MONEY | | | | | | | |
|--|--|------------------------|---|------------|---|---|--|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: | | | | | | | |
| - improving empty property re-let performance | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - a better understanding of how service costs compare to other organisations providing similar services; | | | | | | | |
| - homes that are let quickly to those in housing need; and | | | | | | | |
| - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| | | | | | Reduction in number of 'Hard to Let' properties. People in housing need have greater choice in where and in what type of home they live, leading to greater satisfaction and more sustainable tenancies and communities. People who may not have been housed through CBL because of lower priority now have realistic opportunity to be housed. | | |
| 3.17 | All LSOs use a flexible approach to holding open viewings depending on previous voids, demand, previous refusals at the scheme, unique features of the property etc supported by a consistent procedure. | LSM | LSOs | April 2010 | Open viewings are held Increases housing choice for people in housing need. People who may not have been re-housed through CBL because of lower priority now have realistic opportunity to be housed. | 100% | LSM Briefed LSOs at 1:1s Open viewings which multiple applicants attend has proved successful since inception. Previous HTL properties or schemes have been let successfully. |
| 3.18 | Marketing properties in a professional format at LSC's, the Maltings on a dedicated Property Marketing Board and our website supported by a consistent procedure. | NSO (Projects) | LSM ADTS LC LSOs CM P&AM | June 2010 | A wider audience of people in housing need are better informed about available properties, increasing choice. Increases accessibility to the Trust's homes and improves information to customers. | 80% | Advertising Boards in process of being purchased. LSM liaising with Facilities Manager to implement this by end of May 2010. DCS (H&S) met with CM on 7/5/10 to discuss use of web to advertise properties, currently being implemented. Initial costs have been implemented and costs provided. LSM to purchase estate agent style boards from local budget. FM to purchase display cases. LSM and FM will look to install displays to ensure actioned by end of June 2010. Display poster has been discussed with CM and Lettings and draft agreed. Proof to be produced. |

| VALUE FOR MONEY | | | | | | | |
|---|--|------------------------|---------------------------|------------|---|---|---|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: <ul style="list-style-type: none"> - improving empty property re-let performance Outcomes to be achieved: <ul style="list-style-type: none"> - a better understanding of how service costs compare to other organisations providing similar services; - homes that are let quickly to those in housing need; and - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 3.19 | Dedicated staffing resource to progress HTL initiatives and support the other LSO, given the variable volumes | DCS(H&S) | NSO (Projects) CIO | April 2010 | Available properties are taking less time to let, increasing the number of properties available for letting at any one time. Applicants have greater choice. Communities benefit from a reduction in the number of empty, hard to let properties in their area which has a negative impact on their physical environment and ongoing sustainability. | 100% | Agreed and moved 1.5 FTE to the Lettings Services Team Part time resource in places from 06/04/10 |
| 3.20 | Agree the marketing of HTL 1, 2 & 3 bedroom homes to households who may under occupy. | DCS(H&S) | LSM ADTS LC | June 2010 | Applicants have greater choice. Communities benefit from a reduction in the number of empty, hard to let properties in their area which has a negative impact on their physical environment and ongoing sustainability. Increases housing choice for people in housing need. People who may not have been re-housed through CBL because of lower priority now have realistic opportunity to be housed. | 100% | Agreement reached with B&NES who support the changes which we have now implemented. |
| 3.21 | Identify our homes that have small second bedrooms and either reclassify these as one bedroom homes or market these for couples or families with one child | NSO (Projects) | LSM ADTS LC LSOs | June 2010 | Log of homes that will be advertised for under-occupation Homes re-classified as one beds where appropriate | 100% | Spreadsheet created and populated with identified properties Allocations policy revised to reflect changes Appropriate marketing underway |

| VALUE FOR MONEY | | | | | | | |
|--|--|------------------------|------------------------------------|------------|--|---|---|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: | | | | | | | |
| - improving empty property re-let performance | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - a better understanding of how service costs compare to other organisations providing similar services; | | | | | | | |
| - homes that are let quickly to those in housing need; and | | | | | | | |
| - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| | only. | | | | | | |
| 3.22 | Train SHO's to complete viewing and pre-tenancy questionnaire SHOs to be given contact details and to arrange appointments directly | LSM | OPHSM | April 2010 | Sheltered properties are let more quickly. Applicants benefit from receiving specialist knowledge of the scheme and the sheltered service at the viewing which leads them to make more informed choices about their new home. Leads to greater satisfaction amongst new tenants. Applicants build up an immediate connection with the person who will be providing a support service to them. Reduced re-let times as Lettings officers are freed up to concentrate on letting other properties more quickly. | 100% | Training completed SHOs now carrying out viewings and arranging appointments. |
| 3.23 | Hold open days to promote sheltered schemes and create demand where hard to let problems are experienced. | NSO (Projects) | OPHSM SHOs | May 2010 | As 3.22 above. Increases housing choice for people in housing need. People who may not have been re-housed through CBL because of lower priority now have realistic opportunity to be housed. Older people in housing need who may not be aware of the Trust's sheltered properties are able to access the service. | 100% | Open day was held at Avon Court in Batheaston which led to 2 previously HTL properties being let immediately. Advert is in June's B&NES newsletter 'Connect'. This advertises our sheltered schemes and provides named officer to contact as well as dedicated e mail address – 'shelteredhomes@somer.org.uk'. Database in place which records the names and addresses of people who respond to advert. |
| 3.24 | Identify the best locations/ways to advertise & promote sheltered homes, create a "waiting list" of people interested in sheltered housing | NSO (Projects) | ADTS LSM LSOs OPHSM CM | July 2010 | Older people in housing need who may not be aware of the Trust's sheltered properties are able to access the service. Vulnerable people in housing need have greater choice of housing options. People who have difficulty accessing housing | 100% | See 3.23 above Presentation given to Black and Ethnic Minority Senior Citizens Advice service (BEMSCA) to promote Sheltered Housing and how we advertise, promote and let empty homes. Presentation to SHOP Allocation policy revised to open up to homes to 55+ age |

| VALUE FOR MONEY | | | | | | | |
|--|--|------------------------|-----------------------------------|------------|---|---|--|
| Recommendation: R3 | | | | | | | |
| Improve the approach to value for money in the services inspected by: | | | | | | | |
| - improving empty property re-let performance | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - a better understanding of how service costs compare to other organisations providing similar services; | | | | | | | |
| - homes that are let quickly to those in housing need; and | | | | | | | |
| - more efficient services for tenants. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| | | | | | because of Homesearch & IT difficulties increase their access options. Relet times are reduced | | group |
| 3.25 | Design & implement a reward scheme where sheltered residents & Older Persons Interest Groups recommend a friend/family who would like to move into sheltered and successfully move | NSO (Projects) | OPHSM ADTS LSM | July 2010 | See 3.23 above | 50% | Presentation to SHOP re options for scheme Meeting arranged with Communications Team re publication of scheme |
| 3.26 | Identify residents who could be available to meet with prospective new tenants and those interested in sheltered to answer questions from a resident perspective | LSM | OPHSM ADTS SHOs SHTLs | July 2010 | Scheme launched Residents are available to meet prospective new tenants New tenants are more satisfied with their new homes | 0% | |
| 3.27 | Tenancy sign up service offered to tenants from local service centres to increase service delivery flexibility supported by a consistent procedure. | ADTS | NSM NSO LSO | April 2010 | Reduced re-let times. Working people have more flexibility as to when they sign up for their tenancy. People can choose where to complete tenancy sign up which is more convenient for them. | 100% | Staff briefed and are using a flexible approach to location and times of sign ups to meet customer demand |
| 3.28 | Weekly rota established for early evening sign up's at the LSC's in response to applicant request. | LSM | LSO NSM NSO LC P & AM | May 2010 | Working people have more flexibility as to when they sign up for their tenancy. | 100% | Completed using a flexible approach to location and times of sign ups to meet customer demand |

4. Gas Servicing

| GAS SERVICING | | | | | | | |
|---|---|------------------------|--|--|--|---|--|
| Recommendation: R4 | | | | | | | |
| Improve outcomes in the delivery of gas servicing by: | | | | | | | |
| - improving performance on gas service completions, including the level of annual gas services that are completed within the legal 12 month requirement | | | | | | | |
| Outcomes to be achieved: | | | | | | | |
| - safer homes for tenants; and | | | | | | | |
| - improved service delivery. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 4.1 | Appoint interim Gas Safety Manager | DCS(P) | HR | March 2010 | Interim in place | 100% | Interim GSM in place .Agreed to remain in post until 1 st Oct. minimum. |
| 4.2 | Complete recruitment of permanent Gas Safety Manager | DCS(P) | HR | August 2010 | | 50% | Interviews carried out 22/04. Unable to appoint. Salary review being completed |
| 4.3 | Revise the approach to the annual servicing programme by: <ul style="list-style-type: none"> develop new policy, procedures, letters and leaflet; complete equality impact assessment (EIA) and action plan identifying VFM targets train engineers and frontline staff in new procedures; implement new programme | CPM / GSM | CM ICTM Budget for new leaflets Staff time for training | July 2010 | Policy approved by Board Procedures in place and being followed Revised letter sent to tenants Leaflet in place and available from website Publicity in Somer Times EIA completed and action plan Staff training complete and evaluated Reduced level of 'no access' Reduced level of 'out of date' servicing 100% success through the year | 75% | Revised Policy approved by Board (May 10) EIA complete and reported to Board in May 10. Actions reflected in 2.1, 2.2 & 2.4 Procedures approved by Trust Management Team Letters and leaflet drafted Gas engineers and staff briefed Interim programming already in place |
| 4.4 | Check system to ensure compliance and improved service delivery for residents | CPM / GSM | Gas intervention team | September 2010 | Annual report to tenants 2011 shows: Reduced level of 'no access'; Reduced level of 'out of date' servicing; 100% success through the year; Improved customer satisfaction ratings. Value for money being demonstrated. | 0% | Links to TSA standard 1&2 and local standards at 1.1-1.6 |
| 4.5 | Develop and agree a range of performance measures aligned to the purpose of the gas service, to be used by staff, managers, Board | CPM / GSM | MIO | End June 2010. 1 st report using revised performance | Monitoring reports to Board and resident scrutiny panel each quarter to include outputs, recommended actions to improve and reports on actions taken; Up-to-date performance information on website | 75% | New suite of performance measures approved by Trust Management Team. Passed to MIO to compile data for Q2 report for Board Sept 2010. Linked to 2.1 |

GAS SERVICING
Recommendation: R4

Improve outcomes in the delivery of gas servicing by:
 - improving performance on gas service completions, including the level of annual gas services that are completed within the legal 12 month requirement
 Outcomes to be achieved:
 - safer homes for tenants; and
 - improved service delivery.

| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
|-----|---|------------------------|-----------------------|--|---|---|--|
| | and resident scrutiny panel (once established) | | | measures to go to Board September 2010 | Annual report to tenants 2011 | | |
| 4.6 | Develop quarterly data validation process between existing IT systems | GSM | MIO Internal Audit | July 2010. and quarterly | Validation process in place Excel 'look up' reports produced Annual Internal Audit assurance report | 75% | Report template in place. Validation to take place early July and then quarterly thereafter. Included in revised procedures. |

| GAS SERVICING | | | | | | | |
|--|--|-------------------------------|---------------------------|---------------|--|--|---|
| Recommendation: R4 | | | | | | | |
| Improve outcomes in the delivery of gas servicing by: <ul style="list-style-type: none"> - improving the quantity of external quality inspections of gas services to meet good practice guidelines - ensuring completed gas safety inspections meet gas safety regulations Outcomes to be achieved: <ul style="list-style-type: none"> - safer homes for tenants; and - improved service delivery. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 4.7 | Develop monitoring reports to ensure 10% external quality checks completed | GSM | | April 2010 | Reports on number of checks completed against number of services completed Action taken to ensure levels required | 100% | 10% quality checks carried out |
| 4.8 | Develop quality assurance framework for managing engineer quality, using data provided by internal and external quality checks | GSM | | July 2010 | Quality assurance reports being used by Gas Safety Manager to improve quality | 75% | Revised process now in place involving Gas Supervisor audits and external audits and confirmed within the procedures. |

| GAS SERVICING | | | | | | | |
|---|--|-------------------------------|--------------------------------|-------------------------|---|--|--|
| Recommendation: R4 | | | | | | | |
| Improve outcomes in the delivery of gas servicing by: - routinely testing tenant satisfaction with gas servicing Outcomes to be achieved: - safer homes for tenants; and - improved service delivery. | | | | | | | |
| Ref | Key Tasks | Officer(s) responsible | Resources required | Due by | Evidence required to evidence outcome achieved | Progress made (% completion reported quarterly) | Comments |
| 4.9 | Develop and implement customer satisfaction survey with residents | CPM / GSM | Staff time Production costs | July 2010 and quarterly | Survey form Quarterly performance pack | 75% | New survey form signed off by Gas Safety Focus Group. Process agreed. Gas Engineers briefed mid June for immediate start |
| 4.10 | Monitor responses and report feedback through team meetings, to managers and Board | GSM | Staff time | July 2010 and quarterly | Quarterly Performance report | 0% | Linked to 4.5 and 2.9-2.10 |

5. Key & Glossary

Key

| Abbreviation | Job Title | Abbreviation | Job Title |
|--------------|---|--------------|---|
| AA (MA) | Assistant Accountant (Management Accounts) | H of MA | Head of Management Accounts |
| ADAM | Assistant Director Asset Management | HR | Human Resources |
| AD(R) | Assistant Director Repairs | ICTM | Information Communication Technology Manager |
| ADTS | Assistant Director Tenancy Services | LC | Lettings Coordinator |
| ASBM | Anti-Social Behaviour Manager | LSA | Lettings Services Administrator |
| CIO | Customer Information Officer | LSM | Lettings Services Manager |
| CIM | Community Investment Manager | LSO | Lettings Services Officers |
| CIT | Community Investment Team | MIO | Management Information Officer |
| CM | Communications Manager | NSM | Neighbourhood Services Managers |
| CPM | Change Projects Manager | NSO | Neighbourhood Services Officers |
| CSA | Customer Services Advisor | OPHSM | Older People's Housing and Support Manager |
| CS(H&S) | Director of Customer Services (Housing & Support) | P & AM | Policy and Admin Manager |
| DCS(P) | Director of Customer Services (Property) | SCHT MD | Somer Community Housing Trust Managing Director |
| FM | Facilities Manager | SCM | Sustainable Communities Manager |
| GCE | Group Chief Executive | SHOs | Sheltered Housing Officers |
| GDCS | Group Director Corporate Services | SHOP | Sheltered housing and older persons (working group) |
| GFD | Group Finance Director | SHTLs | Sheltered Housing Team Leaders |
| GSM | Gas Service Manager | SIM | Service Improvement Manager |
| H of G | Head of Governance | VTL | Voids Team Leader |

Glossary

| Abbreviation | Meaning | Abbreviation | Meaning |
|--------------|--|--------------|--|
| B&NES | Bath and North East Somerset Council | PECT SLA | Peterborough Environment City Trust Service Level Agreement (providing void energy management service) |
| BEMSCA | Black and Ethnic Minority Senior Citizens Advice service | Q4 | Quarter 4 – January to March for performance monitoring purposes |
| CBL | Choice based lettings | RSLs | Registered Social Landlords |
| CLG | Communities and local government | SMART | Specific Measurable Achievable Realistic Timebound |
| C&R | C&R Associates is a company commissioned to undertake the customer profiling survey on behalf of the Trust | SNI | Short Notice Inspection |
| E&D | Equality and Diversity | SRC | Somer Residents Committee |
| EIA | Equality Impact Assessment | STATUS | standard format of customer satisfaction survey produced by the National Housing Federation |
| FTE | Full Time Equivalent | TMT | Trust Management Team |
| GN | General Needs | TSA | Tenant Services Authority |
| HTL | Hard to let | VFM | Value for money |
| KLOE | Key lines of enquiry | | |
| LSCs | Local Service Centres | | |